



NEW MANAGER'S SUCCESS PLAN

**QUICK START GUIDE WITH 10 STRATEGIES
TO POSITION MANAGERS FOR
SUCCESS FROM DAY ONE**

TUESDAY *Strong*

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WHAT MANAGING WITHOUT GUIDANCE COSTS US



Hiring, training and attrition cost us a lot – much more than we might think:

- 1 First, it can cost us our jobs. We may think because we've acquired a certain level of experience and education that we're somewhat insulated from cutbacks or outsourcing but that's not everyone's reality. Yes, some individuals, given the nature of their profession or their connections, can easily secure new positions. For the rest of us we cannot afford not to be prepared to perform at very high levels.
- 2 Second, it can cost us our retirement. Poor performance can result in lost opportunities and compensation. If we perform at substandard levels we are positioning ourselves to be paid less than what's possible—essentially negatively impacting our standard of living for the rest of our lives.
- 3 Third, it can cost us our reputations. There's no way substandard performance will help us develop and secure opportunities that position us to live up to our full potential. Making mistakes that cost organizations money or negatively impacting morale or the organization's brand can cost us our reputations. Reputations are based upon trust—trust which is built over time. Our reputations are directly connected to recommendations and the opportunities we receive. When we damage our reputations, we decrease our earning power.
- 4 Fourth, it can cost us our peace of mind. The stress of trying to keep our jobs, take care of our families and ensure that we can have quality time with family and friends can keep us awake at night. When we manage without guidance we are risking our peace of mind because we know if we mismanage in even one area at work it could be enough to lose the company money or create unnecessary risk—either of which could cost us our jobs or negatively impact our earnings and opportunities.

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MANAGEMENT IS A PREPAREDNESS ISSUE

Managing without proper training is expensive. Going in debt in this way can prove costly.

However, these types of mistakes can prove beneficial.

Why? Because it can force you to learn how to navigate within the political waters that exist within every organization. This can be particularly helpful if it happens early in your career.

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HOW TO GET AND STAY PREPARED

It's easier than you might think. But you have to put in the time and effort to learn about the various aspects that will impact your performance and career. What's great about this type of learning is that you can learn as you work—think of it as 'on the job' training led by you.

Technology, globalization, and the pace of change continue to be drivers for independent career management. Professionals too often rely on their employers to manage their careers. Feedback and professional development opportunities from the work environment are extremely valuable. They can help align your efforts, leverage your strengths and improve your weaknesses while helping you maintain or exceed performance expectations. But if you rely on such feedback and professional development opportunities in isolation you may be doing your career and long-term plans a disservice. If you are not proactively managing your career, don't be surprised when you're not promoted or considered for vacancies or other opportunities.

How can you get prepared? In the information that follows, I provide actionable strategies that you can use today to help you navigate as a manager:

- Goals
- Operations
- Networking
- Learning and Development
- Market Awareness
- Communication
- Performance Management
- Politics
- Troubleshooting
- Brand Ambassadorship

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STRATEGY NO. 1

SET GOALS TO MAXIMIZE PERFORMANCE

Goal setting matters because organizational performance, revenue and sustainability rely on it. Culture impacts goal setting and contributes to the norms that guide employee behavior. Goal setting matters from a talent attraction standpoint. Professionals want to be employed by organizations confident in what they're attempting to achieve—organizations with well thought out plans to enable success. Talent is attracted to the best brands and the best brands typically have goals and plans to guide employee performance.

For managers, basic goal setting definitions can help connect planning with action and measuring results. Consider the following definitions associated with goal setting:

Goals: Accomplishments to be achieved.

Objectives: Specific, measurable steps that have a completion date.

Strategies: The “thinking” aspects involved in achieving objectives.

Tactics: The “doing” aspects involved in achieving a strategy.

These definitions provide shared language to promote understanding and guide discussions. Managers should also consider the various goal types as they approach setting goals with employees.

- Organizational
- Departmental
- Team
- Individual
- Participative
- Self-set
- Manager set

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Organizational Goals

Many organizations use strategic planning to establish the organization's goals and strategies. This process varies by organization but it usually involves a few common steps such as: creating a team to guide the process; reaffirming or updating the organization's mission; gathering stakeholder input; drafting goals, objectives, strategies and gathering additional stakeholder input followed by refinement; establishing tactics and determining the resources needed to achieve the goals. Teams responsible for creating these types of plans typically communicate with stakeholders periodically throughout the process. Lastly, the strategic plan is finalized and communicated to all stakeholders. This process needs to be comprehensive to ensure stakeholder involvement.

INVOLVING STAKEHOLDERS IS CRITICAL

While using such a process can benefit the organization, it can take months. Challenges can arise when leadership changes occur during the strategic planning process. A lack of expertise, time and funding can also prove troublesome. Leadership should consider the opportunity costs of moving forward with the strategic planning process and if the time is right to proceed with the process. Proceeding with strategic planning without the appropriate expertise and resources can result in a lack of commitment, decreased morale and wasted resources.

Organizational history with strategic planning should be considered during the process as well. Organizations with negative prior experiences with strategic planning should approach the process cautiously and consider the tone of the organization's climate as well as the results and perceptions about the prior experience. Strategic planning is critically important because it provides a foundation from which the organization progresses and employee actions are guided.

Goals that result from a strategic planning process can be quite effective because they can help identify shared interests and build upon common understandings.

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Departmental Goals

Departments typically assume responsibility for goals associated with their specialty or area of expertise. Goals often result directly from the development of a strategic plan. Departmental leaders or managers are then tasked with communicating goals and directly correlating them to employee performance. Let's consider a fictitious professional services firm to illustrate concepts. Our firm, Maxwell Services, LLC, is a professional services firm specializing in management and career development. They recently acquired a firm in another state with expertise in continuing education and training. The executive team proposed that new customer growth of 20% could be realized from the acquisition given that staff from the acquired company will be available to augment Maxwell Services' existing team due to their relocation. The organization used the following as the basis for their decision making:

Goal: Be a model full service consulting firm providing superior, integrated professional solutions.

Objective: Increase new business by 20% within two years.

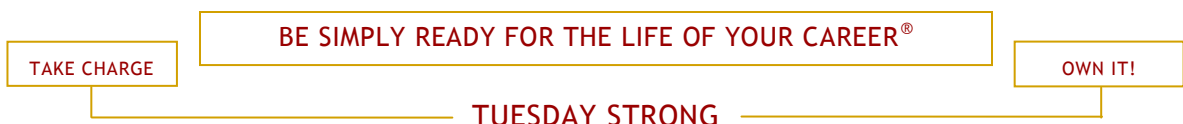
Strategy: Acquire firm with expertise to expand services.

We'll examine the process used by the management of the sales department. Four business development officers pursue new business within this department, each representing a different territory throughout the state. Two staff are from the existing company and two are from the acquired company. Let's assume that each business development professional possesses a background in management and human resource development and that they have worked in business development for approximately five years each. A marketing manager is also part of the team with shared reporting to the marketing department. The acquisition requires the business development team to pitch the expanded services to potential clients in addition to the company's core services. The Division Director is preparing to use the following to guide the team.

Departmental Goals, Objectives, Strategies, Tactics Example

Goal: Become a leading provider of expanded, integrated services.

Objective: Secure a 15% increase in new business sales by June 30, 2016.



Strategies:

1. Leverage expertise, expanded services and relationships to secure sales.
2. Develop and implement marketing campaign to support expanded services.

Tactics:

1. Identify target audience and territory for potential new customer acquisition.
2. Leverage relationships and insight (new staff, Chamber of Commerce, associations, volunteerism, etc.).
3. Understand expertise and prior experiences of all staff.

Effective managers are proactive and take consistent action to get to know staff and provide opportunities for the staff to get to know one another. With departmental goals set, management can now work to establish team and individual goals. Managers need to understand the knowledge, skills, abilities, style and interests of the new staff prior to assigning work.

Conversations with staff can help management discover strengths and interests—both of which will be key to actual performance. Building relationships based upon trust is a benefit of having conversations with employees prior to establishing goals. Employees have a tendency to be more understanding and supportive of goals if they have the opportunity to discuss operations and their role within the organization with their manager instead of simply having goals dictated to them. This type of participative goal setting can set the tone for performance while positively impacting morale and productivity.

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Individual Goals

You may discover involving employees in the goal setting process helps to increase ownership of the goals. It can also increase levels of engagement, improve morale or both. Departmental goals may be set for you by upper management resulting in limited flexibility for individual goal setting. In this situation you can gather input from employees regarding the objectives that need set to support the realization of the goals. Past and current practices should be considered as well as available resources.

Ensure employees understand that their input is only one aspect involved in establishing objectives. It's important that employees understand how the goal setting process works and their role within it.

The goals, objectives, strategies and tactics below continue the preceding example and demonstrate how goals can cascade down from upper level directives to departments and individuals.

Goal: Become an integrated team member and sales producer.

Objective: Manage 20 existing accounts and secure 10 new accounts by June 30, 2016.

Strategies:

1. Leverage history and team member knowledge to identify prospective customers.
2. Understand marketing and sales abilities in relation to current best practices and trends within the marketplace. *Determine if new methods need introduced to team members to reach potential customers.*

Tactics:

1. Create and implement a business development plan focused on cultivation.
2. Engage regularly with your network to stay current with industry norms.
3. Understand industry metrics and which methods are producing the most results given current market conditions.

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New Manager Goals

You will most likely have responsibility for various goals if you are a new manager. They include departmental goals, team and individual goals. You should take steps to get to know your supervisor and their expectations for your performance as well as any preferences they may have for communication and general operations.

You can maximize your performance as a new manager by using an action plan to guide your first 90-days in your new role. Remember that you'll need to adapt your plans as you engage with others and learn more about the organization, leadership and employees. Understand your short and long-term goals and use this information to draft your action plan.

Your current job description and conversations with your supervisor can guide the development of your plan. You'll need to learn about the culture and factor this into your plans. Learning about and adapting to the culture will be critical to your success. Knowing who your stakeholders are and including them in your action plan is equally important.

An action plan can help position you for effective long-term performance. Even though you should have already done your research prior to applying for this position, ensure that you've taken enough time to thoroughly understand your organization's goals, the market and your customers. ***Seek opportunities to partner with other managers to build your team and the department and proactively grow relationships within your department and throughout the organization.*** Build alliances both internally and externally.

Learn what it takes to inspire and motivate others and always remember that you are responsible for your professional development. ***One of the quickest and easiest tasks you can accomplish involves knowing how to conduct meetings.*** Running effective meetings positions the team for success. Use agendas, scheduling, meeting duration, information sharing and collecting input to help set expectations and guide the team's performance.

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Partner with Your Supervisor

Meet with your supervisor to discuss a 90-day action plan once your job description and goals have been confirmed. It's best to have this conversation within the first week of assuming your new role. It's easy to get busy learning and managing daily activities and neglect establishing expectations and planning for success. You may want to consider tackling projects or goals that help build cohesiveness of the team in the short term.

Your Supervisor's Communication Style

You also need to understand your supervisor's communication style and preferences early on and decide how you will adapt your behavior to make communication with them efficient and effective. For example, understand the frequency that you'll meet in person and how the meetings will flow. Use email to supplement the in person meetings and ensure communication is frequent enough without being burdensome. You and your supervisor may agree to use email subject lines with brief descriptions and FYI's to assist you both.

Develop and Manage Staff

If this is your first supervisory role you need to get up to speed quickly while simultaneously managing employees. Learn your organization's processes and understand the resources that are available to help you. This may involve your human resources department, on and off-site training and mentoring opportunities. Even if you've supervised employees in the past you should understand and plan to use the resources available to you in this new role.

Build learning the processes and resources into your 90-day action plan. Learn about the employee's performance individually and as a team as well as their history, challenges and successes. Also understand the reward and recognition systems. Work with your employees to set and communicate clear expectations for them and plan to guide their development with and without formal goals.

Staying engaged with employees and ensuring effective communication will help you frame performance based conversations. *Ensure the goals you set with your employees are realistic, time-bound and within the employee's reach.*

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One of the worst things you can do is to set goals for your employees that are dependent upon others achieving their goals. Doing so can ruin your credibility with the employee. Numerous resources are available to help you learn how to set goals correctly. Take the time to learn about this process and approach goal setting confidently with your employees and supervisor. ***You cannot be a high performing manager if you do not know how to correctly set goals and motivate employees.***

Remember to recognize employees and take deliberate steps to create an environment that is productive and fun.

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HOW TO SET GOALS

Understanding how to set goals can position you and your team for success. Challenges can arise when your supervisor either doesn't understand how to set goals or they confuse the process. Your supervisor may denounce its importance or role and unintentionally undermine your efforts to guide and empower employees.

I've known managers who have dreaded goal setting so much they spoke negatively about it in front of employees and other managers. I've also worked with managers who made poor attempts to satisfy their supervisor simply by putting it off as long as possible—in some instances not setting goals for years. Don't be this type of manager!

Learn to set goals properly and proactively deal with the challenges if your manager doesn't know how or chooses not to set goals appropriately.

Effective goal setting begins with understanding and using the correct terminology. For example, you could set goals for your employees but without providing them with objectives to be met within a specific time frame they could take various actions that don't contribute to realizing the goal or they may not complete the tasks required within the necessary timeframes.

Keep in mind this type of deliberate goal setting may be new for employees as well. You may need to adapt the terms to fit your organizations' culture and procedures. *Discuss the goal setting process with your supervisor to establish a shared understanding and expectations for your performance and that of your team.* Use the following terms to guide you:

Goals are accomplishments to be achieved.

Objectives have specific, measurable steps that have a completion date.

Strategies are the “thinking” aspects involved in achieving objectives. This is what happens above the shoulders.

Tactics are the “doing” aspects involved in achieving strategies. This is what happens below the shoulders.

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1 Review employee files and understand how goal setting has been handled in the past. You may discover that you are inheriting employees that have experienced a lack of direction or an incorrect application of policies and procedures. You may also have employees that have a history of being poor performers.

Understand your organization's policies and procedures before setting goals.

Unfortunately, politics can also influence how managers set goals and manage employee performance. This can be difficult to comprehend or discover but it's important that you do—and do it as soon as possible. This can be accomplished by getting to know your employees, peers and leaders and look to identify any inconsistencies in how employees within your department have been managed.

2 Draft goals, objectives, strategies and tactics for all employees within your department. Anticipate leveraging employee strengths when possible. Use your draft to guide the conversations you have with employees.

3 Communicate how the goal setting process will work with all employees. By doing so you're letting them know that they should anticipate having this conversation with you rather than feel as if they're being put on the spot. This can reduce any defensiveness and motivate them to prepare for the discussion. Share departmental goals with all employees as a group. By meeting with all employees as a group you can give them the opportunity to ask questions and learn information together; hopefully alleviating any anxiety they may have about goal setting or how you plan to approach the process.

4 Meet individually with employees. Reiterate the process with employees and confirm their role within in. Explain the organization's goals and the department's goals and how their goals and objectives will support achieving the overall organizational goals. Give employees the opportunity to ask questions and take the time to ensure that you've answered their questions to achieve understanding. Seek their input and describe the goals and objectives you've drafted for them. Keep in mind depending upon what they say, you may need to modify what you've drafted and create modified or new goals and objectives. This is easier than it sounds if you keep in mind the definitions for goals and objectives. If this is too

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uncomfortable for you or you'd like the opportunity to consider what they've said or seek advice from your manager, let them know that you'll meet with them again to finalize their goals and objectives. You may discover that your employees are suggesting goals and objectives that are progressive or more challenging than what you'd anticipated setting for them.

5 Communicate expectations. Finalize goals and objectives and ensure employees understand them. Discuss them and the ways in which they will be supported. Give them the opportunity to ask questions and express any concerns. Be clear about expectations and how frequently you plan to discuss progress with them.

6 Empower and guide. Ensure employees have the support and resources they need to make progress and achieve goals and objectives.

7 Keep good records. Document goals and objectives and give them to employees in writing. Keep notes throughout the year to help you keep track of both positive and negative events. Be sure and acknowledge positive performance with employees when it occurs and discuss poor performance as it occurs as well—do not wait until giving a performance appraisal to discuss performance that should or needs to be acknowledged.

8 Foster and celebrate. Foster an environment in which employees can flourish. Seek opportunities to empower them to perform individually and as part of teams. Reinforce positive performance and set the tone for the group. Celebrate success consistently.

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STRATEGY NO. 2

COMMUNICATE WITH CONFIDENCE

Effective communication is critical to a manager's ability to succeed because so much of a manager's job involves communicating with employees to ensure they can take the necessary action to fulfill goals. Communication occurs when messages are sent by an individual and received and understood by another. It generally involves components, context, body language and interference. Managers have the opportunity and responsibility to set the tone and expectations for appropriate communication in the workplace. Social media, technology and various generations working together combine to provide numerous opportunities for managers to adapt to ensure messages are received and teamwork and productivity are fostered.

LISTENING IS THE FOUNDATION

- **Message** components involves encoding content in a way that enables the receiver to decode your message correctly.
- **Context** involves considering the backgrounds, perceptions and intellectual abilities of the receiver.
- **Body language** can include eye contact, hand movements and expressions as well as consistency of message. Consistency of message involves the degree of alignment with what you are saying and what message your body language is sending. For example, someone continues to look at their computer screen during a conversation with you and they verbally assure you that they're listening to you.
- **Interference/noise** involves consideration of several potential barriers that interfere with effective communication. This could involve noise from the environment or even the emotional state of the receiver.

Effective communication can help prevent misunderstandings, build trust, foster relationships and improve performance.

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Listening is the key to effective communication. When we fail to listen we set ourselves up for failure. For example, you've been tasked with pitching a new service line to a group of potential investors. Your team has helped prepared for the presentation based upon your guidance. As you review your meeting notes the morning of the presentation you realize that you failed to include key metrics that the investing team asked about during your last meeting. You overlooked this during the preparation because you were focused on including information that is standard to the company. Your team followed your instructions perfectly and now you lack the time to compile the requested information prior to the meeting. This situation could have been avoided if you'd only truly listened. Effective listening involves:

- **Focusing on the speaker** and ignore distractions and other noise.
- **Interpreting messages** by staying actively engaged.
- **Clarifying as needed** by asking questions.
- **Filtering out the information** that's important.
- **Responding to the speaker** by confirming you understand or taking action as appropriate.

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HOW TO BE IN THE KNOW

- 1 Understand cultural norms.** I've always appreciated the viewpoints of Boleman and Deal. In "Reframing Organizations" they point out that organizational culture, "as a product, it embodies accumulated wisdom from those who came before us. As a process, it is constantly renewed and re-created as newcomers learn the old ways and eventually become teachers themselves." To me, it's helpful to think of culture as a product and as a process because we can learn from the wisdom of those who have worked in organizations before us and as individuals we are shaping the culture for others. Conversations with individuals at various levels within the organization can help you better understand your organization's cultural norms.
- 2 Learn upper management's communication preferences.** Be proactive and learn about upper management's communication styles and preferences early on and decide how you will adapt your behavior to make communication with them efficient and effective.
- 3 Appreciate previous communication practices.** You may be very clear with what you need and want to communicate with your employees but if you fail to acknowledge and learn from those who previously managed the employees, you are positioning yourself for misunderstandings and possibly decreased morale and performance.
- 4 Navigate the organization's politics.** Learning about your organization's culture is key to understanding what's required politically to be effective and achieve your goals. Identify the "players" and understand what motivates them. Typically, but not always, those in senior level positions have had to navigate organizational politics. You may discover that mentorship, either formally or informally, can help you learn quicker and perform at higher levels.
- 5 Go with the flow.** Understand and use the three primary ways in which communication flows through most organizations to your advantage: vertically, horizontally and through the grapevine. Information flows from upper management to you and from you to your employees. It flows from your peers to you and from you to your peers. Information also flows through the organization's grapevine—without regard to positions or the degree to which it's accurate. Awareness of and

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participation in these flows can be critical to a new manager's effectiveness and longevity. Yes, understanding what's flowing through the grapevine is important to managers and staff alike. As a new manager your job is to discern what requires your action and what does not. You need to be in the know and you can only be in the know if others share information with you.

HOW TO GET YOUR MESSAGE ACROSS

Get to know your staff and your supervisor as soon as possible. Try to understand what motivates them as well as what concerns them. Spend time together getting to one another as individuals as well as coworkers. Getting to know each other helps you discover shared interests and build trust.

Most savvy professionals who have been tasked with giving presentations gather as much information as possible about the audience to which they will present. This is usually done in an attempt to discover information that the presenter can use to connect with the audience as quickly as possible. When this occurs individuals are more inclined to trust the speaker and be receptive to their message. The same holds true for effective sales professionals. Understanding customer needs is *THE* priority for those in sales.

Consider the aspects involved in the receipt of your messages. Go through the exercise of identifying the “what,” “who,” “how,” “when” and “where.” Understanding each of these will help you develop more effective messages.

When possible, plan your messages. This is particularly helpful when sharing information with the potential to impact multiple individuals. Try and anticipate the individuals who will be receptive to the information and those who will not. Then identify why some individuals will be resistant to your messages and if there's anything you can do to reduce or eliminate the factors contributing to their resistance. Depending upon your circumstances you may want to try and garner the support of a few key individuals that could lend credence to your message if necessary.

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LEARN, GROW AND STAY RELEVANT

Select the right channel for your audience. Communication occurs in three primary channels: oral, verbal and written. Keep these in mind as well as the ways in which messages can be distributed including but not limited to via: memo, email, social media, webinar, video chat and shared electronic documents.

Never underestimate the power of feedback. Managers have unlimited opportunities to improve their effectiveness. Even very good managers can still learn from others and adapt their style to improve their effectiveness. This is because of change. Organizational circumstances and dynamics are in a constant state of flux. Opportunities exist for managers to adapt to new ways of communicating to ensure messages are not ignored or less effective than intended—seek feedback from your employees and seize the opportunity to learn, grow and stay relevant.

Always be authentic. People usually discover if you're insincere or dishonest with them even if it's not obvious to them right away. No amount of well-rehearsed speeches, memos or other communication methods will earn the respect of employees like your actions will—being authentic positions you to earn trust and grow meaningful relationships.

Engage employees with two-way communication. Listening is critical to effective communication. Strive for two-way communication and communicate consistent messages among employees as much as possible.

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Let's be honest. Managing today is tough. We all start out excited and some of us even a bit naïve, but throughout our careers we earn a few battle scars the hard way. If you are serious about avoiding the missteps that can set back your career or cost you your job, you need a different approach. In my *New Manager's Success Plan*, you'll discover strategies from my fifteen years of management experience that you can use to better understand the scope of your role and get started toward achieving your goals as a manager.

Author bio:

Tuesday Strong writes on career management using proactive talent development and personal branding techniques leveraged by technology. Tuesday offers integrated solutions in career planning, goal setting, personal marketing plans, and social networking strategies. For more information visit: TuesdayStrong.com.

Tuesday holds a Bachelor of Science Degree in Human Resource Management from Saint Mary-of-the-Woods College, a Master of Science Degree in Human Resource Development from Indiana State University, and a Master of Science Degree in Strategic Management and a Master of Business Administration Degree from the Kelley School of Business at Indiana University. Tuesday is a Certified Professional in Human Resources through the Human Resource Certification Institute. Tuesday completed the Management Development Program at Harvard University in Cambridge, Massachusetts.

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